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Poultry Programs

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Poland

Livestock production increased at a rate of one percent, as a result of an increase in poultry production that was great enough to compensate for the decreases in beef and swine production in 2003. Beef production is estimated to fall 4 percent and pork production down 7 percent in the marketing year beginning January, 2004. Poland's broiler exports grew from 23,000 metric tons in 2002 to 25,000 MT in 2003.

Poland Agricultural Trade, Processed Products

| Commodities | Export (US\$ thousands) | | | Import (US\$ thousands) | | |
|---------------|----------------------------|---------|---------|----------------------------|--------|--------|
| | 2001 | 2002 | 2003 | 2001 | 2002 | 2003 |
| Red Meat | | | | | | |
| & Offals | 138,885 | 166,645 | 306,707 | 38,413 | 75,237 | 86,455 |
| Poultry Meat | | | | | | |
| & Offals | 106,381 | 128,295 | 243,756 | 23,308 | 21,870 | 19,459 |
| Meat Products | 88,053 | 94,078 | 110,456 | 8,188 | 10,187 | 10,178 |
| Animal Fats | 9,045 | 8,155 | 12,921 | 8,406 | 8,639 | 9,365 |

U.S. poultry meat entering Poland has primarily been for transit to the east (\$27 million).

Source: USDA/FAS

Singapore Egg Imports

The price of eggs in Singapore rose more than 50 percent following the ban on Malaysian poultry products. Egg prices increased from S\$1.50 to about S\$2.20 per 10 eggs. Prices are expected to top S\$4.

Singapore normally imports 2 million eggs daily, or two-thirds of its supply, from Malaysia, but has been forced to look for alternative sources of eggs. A consignment of nearly 250,000 eggs is due from Australia and New Zealand has 40,000 eggs to Singapore.

Importers are expected to increase liquid and dried egg purchases. Some bakeries were already using egg products even before the ban on eggs from Malaysia.

Singapore's Agri-Food and Veterinary Authority (AVA) has told New Zealand farmers that it would accept health standards which were equivalent to Singapore's health standards, rather than require exporting farms be individually inspected. The AVA is also encouraging Australia, Denmark and the Netherlands to help farms obtain the accreditation needed to ship product into Singapore.

S\$1 = US\$0.58

Source: various news wires

Effects of South Africa's Poultry Export Ban

South Africa voluntarily banned exports of poultry and poultry products in early August, after an outbreak of avian influenza (H5N2) in ostriches in the Eastern Cape Province. South Africa's Ministry of Health later stated poultry meat slaughtered before July 16, and poultry meat treated to a temperature of at least 70 degrees Celsius during processing, were safe for consumption.

Hong Kong, Singapore, the EU, Switzerland, Zambia, Mozambique, Namibia and Tanzania placed bans on poultry and poultry products from South Africa.

In Namibia, some companies had already begun to receive chicken from Brazil with arrangements for more to follow. One company said it would be importing 700 metric tons of whole chickens over the next month. South African importers, who could no longer export South African poultry, were looking for poultry from Brazil to cover previous commitments. Zimbabwe has the capacity to export more poultry to Namibia, but only two Zimbabwean companies currently have veterinary import permits for Namibia.

Mozambique banned all imports of domestic and wild live birds, fresh poultry meat and all related products, including poultry feed, hatching eggs and day old chicks from South Africa. Mozambique also added a requirement for all importers of poultry to produce a document certifying the origin of the product.

Source: news wires

Brazil's Exports of Whole Chicken

| | July 2004 | | July 2003 | |
|--------------|-----------|--------|-----------|--------|
| | *US\$ | MT | *US\$ | MT |
| Saudi Arabia | 16,325 | 17,220 | 9,060 | 10,312 |
| Russia | 6,218 | 7,979 | 1,228 | 1,841 |
| UAE | 5,166 | 6,386 | 3,125 | 4,099 |
| Venezuela | 4,745 | 5,958 | - | - |
| Kuwait | 4,097 | 5,139 | 1,697 | 2,084 |
| Oman | 3,076 | 3,747 | 2,398 | 3,138 |
| Cuba | 2,599 | 2,767 | - | - |
| South Africa | 1,775 | 2,085 | 487 | 828 |
| Yemen | 1,629 | 2,214 | 5,725 | 7,279 |
| Jordan | 1,494 | 1,996 | 1,181 | 1,471 |
| Angola | 1,303 | 1,745 | 1,607 | 2,684 |
| Qatar | 1,002 | 1,328 | 1,040 | 1,338 |
| Singapore | 921 | 1,075 | 485 | 682 |
| Bahrain | 908 | 1,151 | 520 | 679 |
| Turkey | 781 | 1,098 | 467 | 627 |
| Sub-total | 52,039 | 61,888 | 29,020 | 37,062 |
| Others | 6,602 | 8,476 | 4,721 | 7,022 |
| Total | 58,641 | 70,364 | 33,741 | 44,084 |
| *thousands | | | | |

Source: Brazil Ministry of Agriculture

Inspected Egg Products-U.S. & Canada Export/Import Trade**U.S. Exports to Canada, in Pounds (000) (Preliminary)**

| Week Ending August 21, 2004 | | Year-To-Date | | |
|-----------------------------|------|--------------|---------|--------|
| TYPE | 2004 | 2003 1/ | 2004 2/ | 2003 |
| Liquid | 504 | 255 | 9,558 | 10,465 |
| Frozen | 0 | 0 | 11 | 96 |
| Dried | 5 | 28 | 439 | 362 |
| Total | 509 | 283 | 10,008 | 10,923 |

U.S. Imports From Canada, in Pounds (000) (Preliminary)

| Week Ending August 21, 2004 | | Year-To-Date | | |
|-----------------------------|------|--------------|---------|-------|
| TYPE | 2004 | 2003 1/ | 2004 2/ | 2003 |
| Liquid | 234 | 94 | 4,904 | 3,620 |
| Frozen | 51 | 53 | 1,135 | 1,947 |
| Dried | 0 | 0 | 1,764 | 863 |
| Total | 285 | 147 | 7,803 | 6,430 |

Inspected Shell Eggs**U.S Exports To Canada, In 30-Dozen Cases (Preliminary)**

| Week Ending August 21, 2004 | | Year-To-Date | | |
|-----------------------------|-------|--------------|---------|---------|
| TYPE | 2004 | 2003 1/ | 2004 2/ | 2003 |
| Jumbo | 30 | 17 | 319 | 290 |
| Extra Large | 1,230 | 1,840 | 64,470 | 16,907 |
| Large | 3,550 | 4,070 | 145,126 | 69,336 |
| Medium | 900 | 1,140 | 66,742 | 38,607 |
| Ungraded | 3,096 | 8,630 | 186,204 | 79,116 |
| Misc | 0 | 800 | 15,504 | 5,862 |
| Total | 8,806 | 16,497 | 478,365 | 210,118 |

1/ Comparable Week, to-date figures may not total due to rounding.

2/ Includes revisions to previous week (s).

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

Source: USDA/AMS Poultry Programs, Market News Branch.

LIVE POULTRY SLTRD UNDER INSPECTION W/E 21-Aug-04

(PRELIMINARY)

U.S. FOWL SLAUGHTERED DOMESTICALLY

| | LIGHT HENS | HEAVY HENS | TOTAL HENS |
|------------------|---------------|---------------|---------------|
| THOUSANDS | | | |
| Head | 1,657 | 1,298 | 2,955 |
| Last Week | 1,445 | 1,498 | 2,943 |
| Same week yr ago | 1,256 | 1,538 | 2,794 |
| To-date/2004 | 44,931 | 43,552 | 88,483 |
| To-date/2003 | 50,765 | 45,971 | 96,736 |

U.S. FOWL SLAUGHTERED IN CANADA

| | LIGHT HENS | HEAVY HENS | TOTAL HENS |
|------------------|---------------|---------------|---------------|
| THOUSANDS | | | |
| Head | 123 | 0 | 123 |
| Last Week | 221 | 0 | 221 |
| Same week yr ago | 151 | 7 | 158 |
| To-date/2004 | 7,808 | 91 | 7,899 |
| To-date/2003 | 8,278 | 118 | 8,396 |

Data Source: Agriculture and Agri-Food Canada, AISD, AID, Poultry Section

TOTAL U.S. FOWL SLAUGHTERED IN THE U.S. AND CANADA

| | LIGHT HENS | HEAVY HENS | TOTAL HENS |
|------------------|---------------|---------------|---------------|
| THOUSANDS | | | |
| Head | 1,780 | 1,298 | 3,078 |
| Last Week | 1,666 | 1,498 | 3,164 |
| Same week yr ago | 1,407 | 1,545 | 2,952 |
| To-date/2004 | 52,739 | 43,643 | 96,382 |
| To-date/2003 | 59,043 | 46,089 | 105,132 |

Source: USDA/AMS Poultry Programs, Market News Branch

CENTRAL REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE CENTRAL REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

| | | August 27, 2004 | | |
|--|--|-------------------|--------|--|
| | | PRICES | VOLUME | |
| | | (Cents per Pound) | | |

| FAT CONTENT | FROZEN | FRESH | TOTAL | EXPORT |
|----------------|--------|-------|-------|--------|
| 15% OR LESS | | | | |
| RANGE | - | - | - | - |
| WTD AVERAGE | | | | |

CHICKEN, WITH SKIN ADDED

| | | PRICES | VOLUME | |
|--|--|-------------------|--------|--|
| | | (Cents per Pound) | | |

| FAT CONTENT | FROZEN | FRESH | TOTAL | EXPORT |
|----------------|-------------|-------------|-----------|-----------|
| 15% OR LESS | | | | |
| RANGE | - | 15.00-19.00 | 61,200 | - |
| WTD AVERAGE | | 16.33 | | |
| 15-20% | | | | |
| RANGE | 13.75-18.00 | 11.00-20.00 | 2,086,000 | 1,168,000 |
| WTD AVERAGE | 16.25 | 13.62 | | |
| 20% OR MORE | | | | |
| RANGE | - | - | - | - |
| WTD AVERAGE | | | | |

* INCLUDES THE STATES of AL, AR, IA, IL, IN, KS, KY, LA, MI, MN, MO, MS, ND, NE, OK, OH, SD, TN, TX, WI

EASTERN REGION MECHANICALLY SEPARATED CHICKEN

F.O.B. SHIPPER DOCK OR EQUIVALENT, PRICES NEGOTIATED FOR MECHANICALLY SEPARATED CHICKEN IN THE EASTERN REGION IN TRUCKLOT AND LESS THAN TRUCKLOT VOLUMES, CENTS PER POUND, DELIVERY WITHIN TWO WEEKS.

| | | August 27, 2004 | | |
|--|--|-------------------|--------|--|
| | | PRICES | VOLUME | |
| | | (Cents per Pound) | | |

| FAT CONTENT | FROZEN | FRESH | TOTAL | EXPORT |
|----------------|--------|-------|-------|--------|
| 15% OR LESS | | | | |
| RANGE | - | - | - | - |
| WTD AVERAGE | | | | |

CHICKEN, WITH SKIN ADDED

| | | PRICES | VOLUME | |
|--|--|-------------------|--------|--|
| | | (Cents per Pound) | | |

| FAT CONTENT | FROZEN | FRESH | TOTAL | EXPORT |
|----------------|-------------|-------------|-----------|-----------|
| 15% OR LESS | | | | |
| RANGE | 16.50-24.00 | 19.00-22.00 | 1,364,000 | 1,040,000 |
| WTD AVERAGE | 17.46 | 21.61 | | |
| 15-20% | | | | |
| RANGE | 17.00-23.00 | 15.00-21.00 | 2,094,000 | 1,044,000 |
| WTD AVERAGE | 19.49 | 18.02 | | |
| 20% OR MORE | | | | |
| RANGE | - | 17.50 | 200,000 | - |
| WTD AVERAGE | | 17.50 | | |

* INCLUDES THE STATES of CT, DE, FL, GA, MA, MD, ME, NC, NH, NJ, NY, PA, RI, SC, VA, VT, WV

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 27 AUGUST 2004.

The market on fresh white meat was mostly steady on tom breast meat and destrapped tenderloins, balance of fresh white meat steady to fully steady. The frozen white meat market was fully steady on breast trim, steady to fully steady on scapula, wing meat with skin and destrapped tenderloins steady to barely steady, and frozen tom breast meat barely steady to weak. Fresh white meat demand fair to good. Frozen white meat demand light to fair on breast trim and scapula, balance slow. Offerings mixed. The trade sentiment on tom drums was fully steady, tom-full cut wings and tom necks steady to fully steady, tom 2-joint wings steady at best. Offerings of tom drums light and held with confidence, tom full-cut wings and necks light to adequate, tom 2-joint wings adequate to instances fully adequate. Trading fair on white meat for domestic shipments and on tom drums for domestic and export shipments, balance light. For domestic: plant grade non-basted breasts 12-14 lb. 125, 14-16 lb. 120-125, 16-20 lb. 125, fresh scapula 108-109, fresh wing meat with skin 108-110, fresh breast trim 125-129 cents delivered. For export: livers 20-25, fresh tom drums 29.50-30 cents delivered.

FRIDAY, AUGUST 27, 2004**EXPORT TRADING**

| | PRICE RANGE | L.S.T. CODE 1/ | WTD AVG PRICE | VOLUME (000) | WEEKLY WTD AVG PRICE | WEEKLY VOLUME (000) |
|---------------------------|----------------|-------------------|------------------|-----------------|----------------------------|---------------------------|
| DRUMSTICKS, TOMS | 29.50-36.00 | | 31.67 | 360 | 31.00 | 600 |
| WINGS FULL-CUT - TOMS | | | | | | |
| WINGS, V-TYPE, TOM | | | | | | |
| TAILS | 32.00-34.00 | | 33.71 | 140 | 33.71 | 140 |
| MECHANICALLY SEPARATED 2/ | | R | 17.00 | 104 | 17.00 | 104 |
| THIGH MEAT - FROZEN | 82.00-85.00 | | 83.50 | 80 | 83.17 | 240 |

THURSDAY, AUGUST 26, 2004**EXPORT TRADING**

| | PRICE RANGE | L.S.T. CODE 1/ | WTD AVG PRICE | VOLUME (000) |
|---------------------------|----------------|-------------------|------------------|-----------------|
| DRUMSTICKS, TOMS | | T | 30.00 | 240 |
| WINGS FULL-CUT - TOMS | | | | |
| WINGS, V-TYPE, TOM | | | | |
| TAILS | | R | 31.00 | 120 |
| MECHANICALLY SEPARATED 2/ | 17.00 | | 17.00 | 104 |
| THIGH MEAT - FROZEN | 83.00 | | 83.00 | 160 |

WEDNESDAY, AUGUST 25, 2004**EXPORT TRADING**

| | PRICE RANGE | L.S.T. CODE 1/ | WTD AVG PRICE | VOLUME (000) |
|---------------------------|----------------|-------------------|------------------|-----------------|
| DRUMSTICKS, TOMS | | T | 30.00 | 240 |
| WINGS FULL-CUT - TOMS | | | | |
| WINGS, V-TYPE, TOM | | | | |
| TAILS | | R | 31.00 | 120 |
| MECHANICALLY SEPARATED 2/ | | F | 18.00 | 80 |
| THIGH MEAT - FROZEN | | F | 82.00 | 200 |

TUESDAY, AUGUST 24, 2004**EXPORT TRADING**

| | PRICE RANGE | L.S.T. CODE 1/ | WTD AVG PRICE | VOLUME (000) |
|---------------------------|----------------|-------------------|------------------|-----------------|
| DRUMSTICKS, TOMS | 30.00 | | 30.00 | 240 |
| WINGS FULL-CUT - TOMS | | | | |
| WINGS, V-TYPE, TOM | | | | |
| TAILS | | R | 31.00 | 120 |
| MECHANICALLY SEPARATED 2/ | | F | 18.00 | 80 |
| THIGH MEAT - FROZEN | | F | 82.00 | 200 |

MONDAY, AUGUST 23, 2004**EXPORT TRADING**

| | PRICE RANGE | L.S.T. CODE 1/ | WTD AVG PRICE | VOLUME (000) |
|---------------------------|----------------|-------------------|------------------|-----------------|
| DRUMSTICKS, TOMS | | F | 27.50 | 320 |
| WINGS FULL-CUT - TOMS | | | | |
| WINGS, V-TYPE, TOM | | | | |
| TAILS | | R | 31.00 | 120 |
| MECHANICALLY SEPARATED 2/ | | F | 18.00 | 80 |
| THIGH MEAT - FROZEN | | F | 82.00 | 200 |

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Product contains 15-20% fat with skin added.